South East Protected Landscape Visitor Research Review

On behalf of the SEPL Group

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Executive Summary

The South East Protected Landscape Group contracted Tourism South East to undertake a comprehensive review of all visitor research in the South East Protected Landscapes to provide descriptive, attitudinal and behavioural information about visitors to the region's protected landscapes. Post code data profiling was also requested to enhance knowledge about visitors and identify future target markets.

From this review we are able to establish the following information.

Visitor profile

The review reveals a number of 'core' features among the profile of people who visit the region's countryside. Those who visit the countryside are more likely to be day visitors, older adults, in employment, car owners, and from higher occupational grades (ABC1's). Most people also visit in the company of others, typically involving two people and will have visited the area on several previous occasions.

Key target markets

The top 10 market segments identified through the Mosaic profiling are:

E20 Golden Retirement	G29 Footloose Managers
B10 Parish Guardians	B08 Dormitory Villagers
C11 Squires Among Locals	B06 Yesterday's Captains
B07 Distinctive Success	B09 Escape to the Country
A03 Business Class	F24 Garden Suburbia

E20 Golden Retirement and B10 Parish Guardians are represented by older people living active, independent and comfortable lifestyles, including some of the wealthiest in the retired population. Leisure time is spent walking or participating in other country pursuits and travel is also popular.

Types C11 Squires Among Locals and B07 Distinctive Success largely represent the wealthy family market made up of relatively well off families or couples who live in rural or semi-rural settings and who take several expensive holidays a year, often to exotic foreign locations. Types C11 are more country orientated and enjoy shooting, fishing and going for walks. Types B07 are high profile careerists who enjoy exclusive holiday, often having a holiday home at the place they visit regularly. Types A03 Business Class B06 and B08 Dormitory Villagers typically represent the empty nester market, with Types A03 and B06 characterised by well off couples in their 50's or 60's with substantial disposable incomes while Type B08 are typically middle class married couples, with adult children and whose lifestyles are a mix of domestic fun and outdoor pursuits, enjoying many sporting activities.

Types G29 Footloose Managers represent a good target for upmarket, mainstream brands which express significant lifestyle and technology values (high internet users). Personal ease and comfort are important considerations when it comes to taking a day trip or holiday. Whilst there is a strong desire for quality and personal service, Footloose Managers are comfortable with an easy going, informal service style. The final key market segment is Type F24 Garden Suburbia. Typically Garden Suburbia have both the time and the money to make well informed decisions, they buy on the basis of quality of service and reliability and are prepared to pay a premium for convenience. The Internet will be used to check on price comparison sites as well as for entertainment and people are happy to purchase online and by telephone.

Key trip features:

Overnight market small but potential for growth

The vast majority of visitors are local residents and day visitors from home. The overnight market is relatively small representing around 2% to 4% of the overall tourism market and the vast majority of holiday-makers and those visiting friends and family in the area are domestic visitors. This year (2009) there is strong evidence of a surge in holidaying at home, the so-called 'staycation boom', as UK consumers concerns over the recession mean more abandon foreign holidays and stay in the UK instead. For many, this has led to a rediscovery of UK's heritage and landscapes, and coupled with a preference for camping or staying in caravan parks and self-catering cottages, these developments should benefit countryside locations.

Walking the most popular activity

Among the variety of outdoor pursuits available to visitors, walking is the most dominant activity engaged in and is more often than not cited as the main reason for the visit. Visitor also place significant importance to the flora and fauna of the place and its tranquillity, attributes which can be enjoyed more fully when walking.

Use of formal pre-trip information source low

The majority of visitors will have visited on several occasions before and therefore the use of marketing literature such as brochures/leaflets and destination websites to inform the planning of trips was found to be low. If pre-trip information was consulted, it usually involved maps to provide directions to places.

Ease of convenience and perceived lack of alternatives makes car the main mode of transport

Despite growing concern among the public about ecological issues and a greater appreciation of the country's natural assets, most people still travel to and around the countryside by car. However, there is some evidence that many people would chose public transport but feel these are inadequate and therefore that the car is the only viable form of transport available to them.

Visitors make a significant contribution to the local economy

The *direct*[1] economic value of tourism activity in the South East is approximately £10.5 billion and supports over 300,000 jobs in the region. Drawing on data from the national tourism surveys, it is estimated that trips to the region's countryside which will include the 10 Protected Landscapes, contribute £403 million through overnight trip expenditure and £1.35 billion through day trips expenditure[2].

[1] This does not include indirect and induced expenditure.
[2] We are not able to draw any data from the International Passenger Survey on inbound trips to the countryside.

1. Introduction

1.1 Study purpose and objectives

The findings reported in this document form part of phase one of the RDPE funded South East Protected Landscape programme to develop rural tourism between 2009 and 2013. Phase one has involved establishing an evidential baseline of information about the characteristics, behaviour, and spend of visitors to the region's protected areas. The baseline has involved a detailed review of existing visitor research, supplemented with a cross-referencing of visitor data with visitor post code data to develop deeper insights into the profile of the type of visitors who take leisure trips to the regions protected areas.

The baseline data will be used to inform phase two of the programme which will involve identifying and developing new visitor products and offers that will appeal to target segments.

1.2 Research methodology

The baseline study has primarily involved a desk-top review of existing data sources. Existing sources have involved both previous visitor research carried out by Tourism South East, as well as studies undertaken by other agencies on behalf of individual Protected Landscapes. The main documents which formed this review are listed below.

Proposed South Downs National Park Visitor Survey	2003
New Forest National Park Visitor Survey	2004
England Leisure Visits Survey[3]	2005
Progress Disturbance Management visitor surveys in the New Forest	2006
Chilterns AONB Visitor Survey	2007
United Kingdom Tourism Survey[4]	2008
Mid Kent Downs Visitor Survey	2005
West Berkshire Country Parks Visitor Survey	2006
Ashdown Forest Visitor Survey	2007
IOW Walking Festival Post-Event Evaluation	2008
Researching the visitor potential of the Ridgeway	2009

In addition a number of other reports and statistics were consulted to either provide further background information or to help contextualise the findings. Unfortunately no visitor research on the Surrey Hills AONB Unit was available at the time of writing this report.

[3] Results are available at national level for leisure day trips and tourism day trips to the countryside. The 2005 survey also includes leisure day trips to England's National Parks. The ELVS sample is not large enough to provide meaningful regional results.
[4] Tourism South East has access to the raw data from the survey which applies to the South East. \Various cross-tabulations were made of this data to provide information about domestic overnight trips to the regions countryside.

From the review we are able to extract the following information about visitors:

- *Visitor profile*: type of visit, group type, age, home origin and socio-economic background;
- *Visitor origin:* home location, accommodation, etc
- *Visit characteristics*: purpose of visit, type of accommodation used, length of stay, frequency of previous visits, transport used, and trip expenditure etc.
- *Visitor knowledge/opinions:* information used to plan visit and awareness of AONB designation.

To provide further enhancement of the visitor profile data we ran visitor postcodes, gathered from previous surveys, through the segmentation tool MOSAIC. The MOSAIC marketing groups are based on various indicators including income, life stage, media preferences, internet usage as well as key behaviour patterns, leisure interests and holiday preferences. The profiles are compiled following a detailed analysis of the latest societal trends in the UK, using Government Census data combined with a series of primary research studies and national surveys, including the TGI Leisure Index[5].

1.3 Presentation of findings

The focus of this review is the visitor and therefore our attention has been drawn to a number of 'demand-side' issues such as what motivates people to visit, how often do they visit, and what do they enjoy doing during their visit. However, it is also worth drawing attention to the 'supply-end' as the scale and nature of the tourism infrastructure in each Protected Landscape will have a significant influence on the type of people who visit. For example, sites offering café's/restaurants, toilets and educational facilities might attract relatively more families with young children, than those sites where these facilities/services are limited. Differences will also arise from the volume of commercial accommodation available. Remote sites, where accommodation is few and far between, will attract day visitors, often local residents, talking a walk or walking the dog. Conversely, a close clustering of accommodation providers will draw holiday-makers to the immediate area.

To maximise the tourism potential, the importance of appropriate infrastructure - adequate accommodation, ease of access by road, good public transport, and places to eat and drink cannot be overstated. Capturing tourism benefits can prove difficult in areas where these may be in short supply. Whilst this review is not the place to provide a detailed overview of facilities in each of the Protected Landscapes, an audit of tourism supply carried out in 2003, provides a useful starting point to assess what is available in each of the Protected Landscapes, which will in turn help to balance supply and demand relationships. We therefore begin in Section 2 of this report by presenting the results of the 2003 audit.

[5] The Target Group Index provides consumer insights and is used to assist the understanding of target markets and to aid marketing and advertising decisions.

In Section 3 of the report we turn to the visitor and establish the profile of visitors to South East's Protected Landscapes in terms of visit types, age and socio-economic background. This section includes MOSAIC profiling to help us classify visitors into distinct social types to help identify target markets. In Section 4, we examine key trip features such as the main reasons why people visit, what they liked about the place visited; the transport used to reach the site, and how much they spent at the site.

In both Section 3 and Section 4 of the report, findings are presented separately for each of the Protected Landscapes. Information is not available on all subject matters for all Protected Landscapes. Some topics may involve data from only two of three Protected Landscapes. The MOSAIC profiling, however, provides general results for South East's Protected Landscapes and is unable to distinguish between them. The East Hampshire and Sussex Downs AONB are treated as one entity in this study as they both form the South Downs National Park and data is only available at the National Park level. In the final Section 5 of the report, we draw on national survey data to provide an assessment of the demand for tourism trips to South East Protected Landscapes, including both day trips (from home and accommodation base) and overnight trips.

1.4 Study Area

The audit results represented in Section 2 includes all 10 Protected Landscapes in the South East as one of the objectives of this section is to establish the number of tourism businesses in each Protected Landscape relative to its size. In the remaining sections we have excluded Chichester Harbour AONB as we understand that this AONB is not part of this RDPE SEPL programme. Surrey Hills AONB is also excluded as no visitor data was available.

1.5 Visitor Definitions

There are essentially two types of visitors: **local visitors** who are residents living in villages and towns located within the Protected Landscape boundary, and **tourist visitors**, the subject of interest in this review who travel from further a field. There are three types of tourist visitors. These are:

- *Day visitors from home* –visitors on a leisure day trip who have travelled from, and are returning to, their normal place of residence located <u>outside</u> the Protected Landscape boundary.
- *Day visitors from a holiday base* – visitors on a day trip excursions from a holiday or accommodation base located <u>outside</u> the Protected Landscape boundary.
- *Overnight visitors* - visitors on a holiday or leisure visit staying overnight away from home in accommodation <u>within</u> the Protected Landscape boundary.

Occasionally we are unable to distinguish findings between local visitors and tourist visitors. In these instances, we use the generic term 'visitor' to capture all protected landscape leisure users.

2. Business Audit Findings

2.1 Tourism businesses: regional supply

A product audit of each of the Protected Landscapes was carried out in 2003. The audit was based on data provided by a number of the AONBs, and backed up with primary research undertaken by Tourism South East. Where available, we have updated information of stock levels for the purpose of this review.

The total number of recorded tourism businesses in the Protected Landscapes in the South East is 4,510 (see Table 1 below). Most of these will be small/micro businesses. Regionally it is estimated that over 80% of tourism businesses employ 10 employees or less. This is likely to be higher in rural areas where there are fewer large hotels or attractions.

Tourism South East's board estimate of the total number of tourism businesses in the region put the number at just over 11,000 businesses[6]. Of these, 9,519 (86%) are accommodation businesses and 1,507 (14%) are visitor attractions. The overall figure does not include a listing of pubs and restaurants/cafes. If the pub and restaurants categories are taken out of the total of Protected Landscape businesses the comparable figure is 3,473. This would suggest that, at a rough estimate, the 10 Protected Landscapes' in the South East contain approximately a third of all regional tourism supply. This suggests that the Protected Landscape's are important concentration points for tourism supply in general and in the rural areas of the region in particular.

Table 1: Distribution of tourism businesses across South East AONBs

	C.Harbour	Chilterns	E.Hants	H.Weald	IOW	K.Downs	N.Forest	N.W.Downs	S.Hills	S.Downs	Total
Attractions	5	82	70	46	76	20	0	15	17	34	365
Hotels	13	33	4	70	12	48	56	70	19	35	360
B+B/GuestHouse[7]	55	196	81	280	48	200	199	230	99	148	1536
Self Catering	51	33	13	168	208	86	135	44	32	62	832
Camping and Caravan sites	19	3	2	22	15	30	19	6	9	10	135
Hostels	0	5	0	3	1	4	3	2	1	4	23
Inn with Rooms	3	21	8	31	23	18	27	39	15	26	211
Inn/Pub	22	135	41	36	4	56	60	89	138	114	695
Café/Tea Shop/Restaurant	11	35	32	24	7	47	3	24	109	50	342
Other	1	5	4	0	0	0	0	1	1	1	13
Total	180	548	253	680	394	509	502	520	440	484	4510
AONB Size (sq km's)	74	833	383	1460	189	878	670	1730	419	983	7619

[6] An audit of accommodation and visitor attractions was carried out in 2008.
[7] Including farm-based B&Bs

Not surprisingly the largest single category is the B&B/Guest House sector with 1,536 recorded businesses spread fairly evenly across the Protected Landscapes areas. The number of hotels was fairly low but this is to be expected given the concentration of larger hotels in urban and resort areas outside Protected Landscape's. However, as shown in Table 2, the volume of commercial bedspaces is greatest amongst Hotels.

The list below compares the number of recorded tourism businesses by rank order with the size of the Protected Landscape.

AONB	No. of Businesses		Size of Protected Landscape	
High Weald	1	(680)	2	(1460 sq km)
Chilterns	2	(548)	5	(833 sq km)
North Wessex Downs	3	(520)	1	(1730 sq km)
Kent Downs	4	(509)	4	(878 sq km)
New Forest*	5	(502)	6	(670 sq km)
Sussex Downs	6	(484)	3	(983 sq km)
Surrey Hills	7	(440)	7	(419 sq km)
Isle of Wight	8	(394)	9	(189 sq km)
East Hampshire	9	(253)	8	(383 sq km)
Chichester Harbour	10	(180)	10	(74 sq km)

** area based on designated National Park Boundary*

This shows, in general terms, that the size of the Protected Landscape relates to the number of tourism businesses it contains. The four smallest Protected Landscapes by size are also those with the lowest number of recorded businesses.

Two of the three biggest Protected Landscapes contain the highest (High Weald) and third highest (North Wessex Downs) numbers of recorded businesses. In the case of the North Wessex Downs a refinement of the data collection process is likely to yield larger numbers as there were 70 businesses identified to which it was not possible to put a categorisation. With these added, it becomes the second highest in terms of businesses recorded.

The most obvious anomalies from this general rule are the Chilterns where 548 businesses were recorded, the second highest total although it ranks fifth in size, and the Sussex Downs, ranked third in size, but sixth in numbers recorded. In the case of the Chilterns this may be due to the large number of Inns and Pubs recorded.

The New Forest and the Isle of Wight both recorded high numbers of self-catering establishments relative to their size. This is an indication of their profile as holiday destinations and the trend in recent years for visitors staying for longer periods to opt for self-catering rather than hotel or B&B accommodation. The lowest figures for self-catering are recorded in East Hampshire, the Chilterns and the Surrey Hills. This may reflect the proximity of these Protected Landscapes to large urban areas and the resultant competition for property for residential use.

2.2 Commercial bedspace capacity

Because not all entries have a recorded number of bed spaces this figure is difficult to identify with complete confidence. However, based on the data that has been collected and consistent with other work in this area it is reasonable to assume that the average hotel bedspace figure is around 50, and the average rural B&B/Guest House figure is 6, and the average rural Inn with Rooms bedspace figure is 4. The estimated average number of bedspaces in self-catering establishments is 6. These figures represent conservative estimates.

Based on these assumptions, the estimated number of commercial bedspaces available in the protected landscapes is over 47,000.

Table 2: Distribution of commercial bedspaces across South East AONBs

	C.Harbour	Chilterns	E.Hants	H.Weald	IOW	K.Downs	N.Forest	N.W.Downs	S.Hills	S.Downs	Total
Hotels	650	1,650	200	3,500	600	2,400	2,800	3,500	950	1,750	18,000
B+B/Guest House	330	1,176	486	1,680	288	1,200	1,194	1,380	594	888	9,216
Self Catering	306	198	78	1,008	1,248	516	810	264	192	372	4,992
Camping and Caravan sites	1,715	435	15	1,688	1,792	1,539	5,204	606	541	792	14,327
Inn with Rooms	12	84	32	124	92	72	108	156	60	104	844
Total bedspaces	3,013	3,543	811	8,000	4,020	5,727	10,116	5,906	2,337	3,906	47,379

2.3 Average room occupancy

One key indicator of demand for holiday overnight trips is the average rate of commercial accommodation occupancy in the area. Unfortunately, the sample of Tourism South East's regional occupancy survey is too low to provide results by AONB boundaries.

However, there are some recent indications of performance among some accommodation sectors which are typically located in countryside locations. This year, the predicted 'staycation' effect as worries about the recession made many UK consumers reduce costs by holidaying at home seems to have benefited the caravan and camping sector. According to the Camping and Caravanning Club, advanced bookings for the South East up to September this year were up by 10.1% and occupancy was up by 13.2% compared to last year. Our own research shows that the level of bookings for pitches and static caravans was much higher for some businesses this summer; up by 25% or more, and that some countryside holiday park operators saw turnover increase by more than 30%.

3. Key Visitor Statistics

3.1 Type of trip

It is difficult to be precise about the relative proportions of local visitors and tourist visitors for each Protected Landscape as not all surveys provide a detailed differentiation between trip types, whereas other surveys have an inbuilt bias either because the surveys adopted a quota sampling method to restrict over-representation of some groups (i.e. the South Downs Visitor Survey[8]), or took place at special events where the profile of visitors is influenced by the nature of the event (i.e. the IOW Walking Festival Survey).

Furthermore, the composition of trip type will be affected by seasonality and the characteristics of the particular site visited. For example, at the height of the peak tourist season of July to August, 70% of visitors to the New Forest National Park come from outside the district. A survey of visitors to the New Forest National Park carried out over the shoulder season of September to October found that on average 68% of visitors are local residents.

It is also widely held that the particular landscape features and visitor facilities available at a site will have an impact on the type of visitors who visit. ‘Honey pot sites’ see significant increases in tourism volume during holiday periods, whilst lesser well known sites, may be visited everyday by local residents because of their easy accessibility from home, but for limited activities such as walking and walking the dog.

Chilterns: The largest proportion of leisure trips to the Chilterns are made by local residents (74%). Tourist visitors travelling for the day from home make up 18% of all leisure trips. The overnight tourism market is relatively small. Only 2% of visitors stay overnight in the Chilterns and a further 5% travel for the day from a holiday base outside the Chilterns.

South Downs: Overall, 74% of visitors are day visitors from home. Only 4% of visitors stay overnight in commercial or non-commercial accommodation within the South Downs boundary area, and the remaining 22% of tourism visitors are day trippers from holiday bases outside the South Downs National Park area. Reflecting the survey quota 23% of visitors reside within 10 miles of the site where they visit. It should be noted that at some locations, the throughput of tourism visitors was very low, this included sites such as Foredown Tower/Hollingbury Fort where on average 95% of visitors were found to be local residents. As to be expected, the vast majority of tourism visitors are encountered at ‘honey pot sites’ such as Beachy Head and Devil’s Dyke.

High Weald (Ashdown Forest only): The majority of visitors are day visitors from homes outside the area (72%), a further 6% are day visitors on excursions from holiday bases outside the area. Unlike other protected landscape sites, the volume of use by local residents was relatively lower; around a fifth (19%) of visitors are local residents of the Ashdown Forest area. In common with the Chilterns

[8] The survey placed a 20% quota restriction on visitors residing within 10 miles of the site at which they were interviewed.

and the South Downs, only a small proportion of visitors (3%) stay overnight in the Ashdown Forest area.

Isle of Wight (Walking Festival only): Local IOW residents make up around 46% of all walkers to the walking festival. Information is not available on the make up of the 54% of non-Island visitors.

New Forest: Local residents account for 35% of all visitor groups, while visitors who travel for the day from homes outside the New Forest account for 25% of all visitors. On average, 21% of all visitors are on holiday, staying overnight within the New Forest, a far higher proportion than found at the other protected landscapes in the South East. Around a fifth of visitors (19%) visit for the day from holiday accommodation outside the New Forest.

North Sussex Downs (West Berkshire Country Parks only): The vast majority of visitors are relatively local (85% reside within the County). Only 25% of visitors come from locations outside Berkshire. Of these tourist visitors, information is not available on the relative proportions of day visitors (from home and holiday base) and overnight visitors.

North Sussex Downs (The Ridgeway only): The majority of visitors are day walkers, although some walk the National Trail in stages, doing a couple of days at a time. There are a few walkers who stay overnight in the local area, mostly in Ogbourne St George or Avebury, but on the whole most visitors are local people walking for around half a day.

Table 3: Type of trip

	Chilterns	South Downs	Ashdown Forest	New Forest
Local visitor	74%	23%	19%	35%
Tourist visitors	25%	77%	82%	65%
Of which				
Day visitor from home	*18%*	*51%*	*72%*	*25%*
Day visitor from holiday base	*5%*	*22%*	*7%*	*19%*
Overnight visitors	*2%*	*4%*	*3%*	*21%*

3.2 Accommodation used by overnight visitors

Results from UKTS[9] for domestic overnight trips to the South East, reveal that a significant proportion of visitors stay in the home of friends and relatives when visiting the countryside / villages in the region. On average, just over half of domestic overnight trips (52%) to the countryside/villages involve staying in the homes of friends or relatives.

The average proportion of trips involving hotels/guest-houses is lower for countryside / village trips compared to trips to towns and resort locations. There are also significant differences in the use of non-serviced accommodation (i.e. self-catering units, caravan and camping parks etc) by trip location. According to UKTS around a fifth of domestic overnight trips to South East's

[9] United Kingdom Tourism Survey

countryside/villages involve staying in non-serviced accommodation. The proportion is relatively lower for large cities and towns and small town locations.

Table 4: Domestic overnight trips to the South East – Accommodation used

	TOTAL	Seaside	Large city / large town	Small town	Countryside / village
All Friends/Relatives	**50%**	**35%**	**58%**	**57%**	**52%**
Hotel/B&B/ Guest house	30%	31%	35%	30%	21%
All serviced net	**30%**	**31%**	**35%**	**30%**	**21%**
Self-catering	2%	4%	1%	1%	3%
Holiday camp	2%	5%	0%	0%	2%
Camping	4%	3%	1%	3%	10%
Touring caravan	3%	3%	2%	3%	4%
Static caravan owned	2%	7%	0%	0%	1%
Static caravan - rented	2%	5%	1%	1%	2%
All non-serviced net	**15%**	**27%**	**5%**	**8%**	**22%**
Paying guest	4%	5%	4%	3%	6%
2nd home	1%	1%	0%	0%	0%
Boat	1%	1%	1%	1%	1%

Source: UKTS South East regional breakdown

The UKTS regional average figures mask some important differences between countryside locations in the region. For example, in the New Forest 72% of overnight trips involve staying in non-serviced accommodation, significantly higher than the regional average of 22%.

Please note that in some surveys the number of overnight visitors was very low. The Chiltern results for example are based on only 33 overnight visiting groups.

Chilterns: The majority of visitors staying inside the Chilterns area accommodated in the homes of friends or relatives (67%). Just under a fifth use commercial serviced accommodation (hotels, B&B and guest houses).

South Downs: The largest proportion of visitors spending one night or more in the South Downs (47%) stay in serviced accommodation (hotels, guest houses and B&Bs). A further 24% stay in the home of a friend or relative.

Kent Downs (Mid Kent Downs only): The most popular types of accommodation used on a short break or holiday are B&B/guest houses and self-catering accommodation.

New Forest: Of the visitor groups staying overnight within the New Forest National Park area, a fifth (20%) stay in serviced accommodation including hotels (13%), B&Bs (6%) guest houses, pubs or inns (1%). The highest proportion of holiday visitors (72%) stay in various types of non-serviced accommodation including, touring caravans, tents or campervans including rented houses, cottages or flats, static caravans, chalets or log cabins. Five percent stay in the homes of friends or relatives during their visit to the New Forest.

3.3 Profile of visitor

3.3.1 Visitor origins

As established earlier, the largest visitor group frequenting South East's protected landscapes are local visitors and day visitors from home. It is therefore not surprising to find when looking at where visitors have come from that most originate from locations which are relatively near, at least within reach of a day visit. The origin of overnight visitors is more diverse. Overnight visitors tend to come from a range of home locations spread through the UK.

Chilterns: The highest proportion of day visitors from home, around a third, travel from home locations in Buckinghamshire (35%). Equal proportions of day visitors come from Bedfordshire and Hertfordshire (around 20% respectively). Twelve percent of day trips from home are made by residents of Oxfordshire. Overnight visitors tend to come from a range of locations around the UK, though the largest proportion (10%) come from the Greater London area. Overall, only 1% of tourism trips are made by inbound foreign visitors.

South Downs: The majority of day visitors from home originate from homes in the neighbouring counties surrounding the South Downs. The greatest proportion of day visitors on holiday and staying visitors travel from the Greater London area, Kent and Surrey. Overseas visitors make up around 5% of all visitors.

High Weald (Ashdown Forest only): The largest proportion of day visitors came from home come from Sussex (39%) and Kent (25%). Smaller proportions of visitors come from West Sussex (14%), Surrey (6%), Greater London (6%) and further afield.

Isle of Wight (Walking Festival only): Just under half of all walkers are residents of the Island. A fifth travel from locations in the South East (22%). Smaller volumes of walkers travel from other parts of the UK, and 3% are from overseas.

Kent Downs (Mid Kent Downs only): A third of visitors travel from locations in Kent (31%). A further 13% come from Essex and 5% from East Sussex. Visitors from all other counties account for less than 5% of visitor origins.

New Forest: Around half (52%) of day visitors from home come from Hampshire. Just under a third (29%) come from Dorset; a further 7% come from Wiltshire, and rest come from wide range of other counties including Greater London. Overnight visitors travel from wide range of locations, with no particular visitor origin dominating. Typically around 11% of overnight visitors come from Kent and 9% come from Hampshire. Two percent of New Forest National Park visitors are foreign nationals.

Table 5: Top 3 visitor origins

Chilterns		South Downs		Ashdown Forest		New Forest	
Day	Overnight	Day	Overnight	Day	Overnight	Day	Overnight
Bucking'shire	G. London	West Sussex	G. London	East Sussex	Sample too small	Hampshire	Kent
Bedfordshire	Derbyshire	Hampshire	Kent	Kent		Dorset	Hampshire
Hertfordshire	Devon	East Sussex	Surrey	West Sussex		Wiltshire	West Sussex

3.3.2 *Distance travelled*

According to the EVLS[10], the distance travelled in terms of a 'round-trip' for a leisure trip to the countryside is 21.5 miles. As leisure visits involve relatively routine activities, this findings matches perfectly the notion that the majority of countryside visitors are relatively local, visiting for activities such as walking, exercising, getting some fresh air, and walking the dog (or a combination of these).

EVLS makes a distinction between leisure trips and tourism trips. The latter are non-routine journeys and involve a round trip duration of at least three hours. The round trip distance for tourism day trips to the countryside is longer, on average 47 miles. Moreover, the 2005 survey included a separate section on day trips to National Parks. It found that leisure trips to National Parks involved on average a round trip of 35.4 miles[11].

UKTS does not provide data on trip distance, but we do know from the local survey data on visitor origins, that domestic overnight visitors staying in the protected landscapes come from a wide range of locations with of varying distances.

With the exception of the Chilterns Visitor Survey, the other surveys do not gather information on trip distance. As we have already established, trips to the Chilterns are relatively local. In terms of distance, a third of visitors travel less than 10 miles in a round trip Results split by survey location reveal that the largest proportion of visitors to Sharpenhoe Clappers and Wendover Woods travel less than 10 miles (round trip). Hambleden, Hugenden Manor and Ivinghoe Beacon receive relatively more visitors who travel more than 20 miles (round trip) than other locations in the Chilterns.

3.3.3 *Group size and composition*

Most trips to the countryside are made in the company of other people. According to EVLS, trips to National Parks involve an average of 4.57 people. This group size is larger than the averages found among the South East surveys reviewed here. This is most probably due to methodological issues over picking up group tours in survey samples. Face-to-face visitor surveys involving interviews with visitors during their trip tend to under-represent group tour trips because of the practical constraints imposed on stopping large volumes of visitors for interview, and getting good response rates from visitors who may

[10] England Leisure Visits Survey
[11] The survey only examines leisure day trips to National Parks and not tourism day trips.

be keen to keep up with their group and thus not stop for interview. The EVLS involves a telephone survey of households gathering information retrospectively and therefore can pick up more group tour trips.

Chilterns: The average group size is 2.9 people consisting of 0.76 children and 2.17 adults. Around 83% of visitors travel in family groups, as a group of friends, or a mixture of family and friends, 16% of visitors visit alone. Only 1% of respondents were part of an organised group or club.

South Downs: Overall, the majority (79%) of all visitors are with friends and/or family; 17% visit alone, and 3% visit with an organised group or club. The average group size (excluding organised groups/clubs) is 2.5 persons. With the inclusion of group based visits, i.e. coach parties, average group size increases to 2.9 individuals.

High Weald (Ashdown Forest only): The average group size is 2.72 people.

Kent Downs (Mid Kent Downs only): The majority of visiting groups consist of 2 adults. Couples are four times more likely to visit the countryside than families with children under 16 years of age.

New Forest: 46% of all visiting parties consist of two adults; 22% of all visitors travel alone. Smaller proportions of groups consist of three adults (4%) or four or more adults (5%). Groups including children are most likely to include two adults and one or more children (13%). The average group size is 2.6 people. When larger groups of 10 or more people are excluded, the average group size is 2.4 people.

North Sussex Downs (West Berkshire Country Parks only): The average group size is 2.63. Lakes/Discovery Centre attracts the largest group size, an average size of 3.77 people, due to being visited by relatively more family-based groups than many other country parks in Berkshire.

North Sussex Downs (The Ridgeway only): Most walkers on the Ridgeway and Wessex Ridgeway are couples or groups of friends.

Table 6: Average group size

	Chilterns	South Downs	Ashdown Forest	New Forest	West Berks
Total adults	2.17	2.09			1.71
Total children	0.76	0.39			1.1
Total people	2.93	2.49	2.72	2.6	2.8

Table 7: Group composition

	Chilterns	South Downs	Ashdown Forest	New Forest	West Berks
On your own	16%	17%	21%	13%	35%
With partner/family/friends	83%	80%	78%	86%	65%
With a club or organised group	1%	3%	1%	1%	

3.3.4 Age of survey respondents

The ELVS finds that leisure day visits to rural locations and to National Parks tend to be made by an older than average day trip population. Fifty-seven percent of rural leisure day trips and 59% of National Park leisure day trips are made by visitors who are 45 years of age and over, compared to the national average of 48%.

The age profile of domestic overnight visitors to countryside locations is a little more difficult to ascertain as UKTS reports on the age of the respondent and not on the ages of all visitors (though the total volume figures generated by the survey does include children). Nonetheless, the results presented in Table 8 provide some useful insights. It shows that relatively more respondents (in total 36% of the sample) in the age band 16 years to 34 years visited large towns and cities in the South East, than its countryside and villages. Overall, 25% of the sample in this age band visited the countryside / villages.

It is also worth pointing out that whilst the percentage difference is quite small relatively fewer domestic overnight trips to the countryside / villages involved households with children compared to the average for the region (25% of trips to the countryside / villages were made by households containing children, compared to 27% of trips made to the South East generally).

Table 8: Age profile of South East overnight visitors by type of place visited

	TOTAL	Seaside	Large city / large town	Small town	Countryside / village
16-24	16%	13%	21%	14%	12%
25-34	16%	17%	15%	19%	13%
35-44	22%	24%	22%	21%	19%
45-54	15%	16%	14%	14%	17%
55-64	16%	14%	15%	18%	17%
65+	15%	15%	13%	15%	21%

Source: UKTS 2008 South East Regional breakdown

Table 9: Children in household profile of South East overnight visitors by type of place visited

	TOTAL	Seaside	Large city / large town	Small town	Countryside / village
Yes	27%	28%	26%	25%	25%
No	73%	72%	74%	75%	75%

Source: UKTS 2008 South East Regional breakdown

Table 10: National age profile of day visitors to rural locations and National Parks

	All day trip takers	All rural day trip takers	National Park trip takers
Under 45 years	52%	43%	41%
45 years and over	48%	57%	59%

Source: England Leisure Visits Survey 2005

Table 11: National children in household profile of day visitors to rural locations and National Parks

	All day trip takers	All rural day trip takers	National Park trip takers
Yes	31%	29%	26%
No	69%	71%	74%

Source: England Leisure Visits Survey 2005

The relatively mature age profile is re-affirmed by the local site surveys.

Chilterns: We are only able to report on the age of the respondents who took part in the survey not for all visiting parties surveyed. Forty-one percent of respondents are between 25-44 age band, 28% are aged 45-64 and 27% are 60 plus. Only 5% of respondents are aged 16-24

South Downs: 13% of visitors are between 16-34 years, 27% are between 35-54 years and 40% are 55 years or over. The remaining 19% of all visitors are children aged less than 16 years of age.

High Weald (Ashdown Forest only): 34% of visitors are aged 55 or over, 28% are in the age band 35 to 54 years, and 15% are 16 to 34 years of age. Around a quarter of all visitors are children under the age of 16 years.

Isle of Wight (Walking Festival only): 53% of walkers are 60 years and over. A quarter are 50-59 years of age.

Kent Downs (Mid Kent Down only): Around half of all visitors are over 55 years, with the largest group being 55-64 years (36%)

New Forest: Overall, visitors are relatively evenly distributed between the age categories, but with a slight bias towards the older age categories. Overall, 51% of visitors are in the ages 45 years to over 65 years. Around 18% of visitors are children under the age of 16 years.

North Sussex Downs (West Berkshire Country Parks): Locations like Thatcham Lakes attracts a relatively young market, mainly parents with young children. Overall 39% of all visiting parties contain children under the age of 16 years.

Table 12: Age profile of visitors

<table>
<tr><th></th><th>Chilterns*</th><th>South Downs</th><th>Ashdown Forest</th><th>New Forest</th><th>West Berks</th></tr>
<tr><td>% children 0-15</td><td></td><td>19%</td><td>24%</td><td>18%</td><td>39%</td></tr>
<tr><td>% Adults 16-24</td><td rowspan="2">16%</td><td>5%</td><td>6%</td><td>5%</td><td>3%</td></tr>
<tr><td>% Adults 25-34</td><td>8%</td><td>9%</td><td>10%</td><td>13%</td></tr>
<tr><td>% Adults 35-44</td><td rowspan="2">34%</td><td>13%</td><td>17%</td><td>16%</td><td>16%</td></tr>
<tr><td>% Adults 45-54</td><td>14%</td><td>11%</td><td>15%</td><td>10%</td></tr>
<tr><td>% Adults 55-64</td><td>28%</td><td>16%</td><td>15%</td><td>18%</td><td>10%</td></tr>
<tr><td>% Adults 65+</td><td>22%</td><td>24%</td><td>18%</td><td>18%</td><td>9%</td></tr>
</table>

** age of respondent only.*

3.3.5 *Socio-economic background*

Both UKTS and ELVS reveal that visitors to the countryside come from relatively high income, middle class households. According to UKTS 40% of domestic overnight visitors to South East's countryside and villages come from AB households (higher and intermediate managerial/ professional occupations). A further 31% come from C1 households (all other white collar occupations).

ELVS does not use the same grading system but the 29% Wealthy Achievers, the 5% Urban Prosperity and the 26% Comfortably Off who visit rural locations for a leisure day trip paints a comparable picture for day trips.

Only two of the local surveys reviewed for this study gathered information on the visitor's socio-economic background – the South Downs and the New Forest National Park Visitor Surveys. In both surveys, the proportion of AB households among visitors is lower to the averages indicated by UKTS and could be due to differences in the way occupation was graded by the local surveys.

South Downs: 78% of visitors are from ABC1 households; 32% of all visitors come from AB households and 46% of all visitors come from C1 households.

New Forest: 24% of all visitors come from AB households and 48% come from C1 households.

Table 13: Socio-economic profile of South East overnight visitors by type of location

	TOTAL	Seaside	Large city / large town	Small town	Countryside / village
A	7%	6%	6%	9%	9%
B	29%	23%	30%	33%	31%
C1	34%	33%	34%	35%	33%
C2	17%	22%	17%	12%	14%
D	9%	10%	10%	7%	9%
E	4%	6%	3%	4%	4%

Source: UKTS 2008 South East regional breakdown

Table 14: National ACORN classification of day visitors to rural locations and National Parks

	All day trip takers	All rural day trip takers	National Park trip takers
Wealthy Achievers	19%	29%	31%
Urban Prosperity	10%	5%	4%
Comfortably Off	23%	26%	27%
Moderate Means	11%	9%	8%
Hard Pressed	14%	9%	10%
Unknown	23%	22%	20%

Source: England Leisure Visits Survey 2005

3.3.6 MOSAIC Segmentation

The profile of postcode records carried out against the MOSAIC classification have their results displayed in terms of both volume and penetration comparing the presence of certain groups found in the postcode database in percentage terms against the percentage of these groups present on a national basis. Any group with an above average proportion suggest that they are a strong target market as they are more likely to undertake visits to the protected landscape areas (i.e. they show a higher than average propensity to visit). In MOSAIC the higher than average propensity to visit is expressed as an Index Score. A score of 100 represents the national average therefore those groups with an index score above 100 are potential target markets.

3.3.6.1 MOSAIC profile of current visitors – pure counts

In the table below a numeric count is provided of the number of visitors from the postcode data, which falls into each of the MOSAIC Groups. This provides information on the overall makeup of the profiled database. In terms of count, the top three MOSAIC Groups visiting AONB's in the South East are Group B Professional Rewards (19.55%), Group F Suburban Mindsets (14.57%), and Group D Small Town Diversity (12.2%). These groups make up the largest proportion of AONB visitors in the South East.

Table 15: Results by MOSAIC Group

	UK POPULATION		SE AONB VISITORS	
Group	Count	Proportion	Count	Proportion
B Professional Rewards	5,296,512	8.66%	2,285	**19.55%**
F Suburban Mindsets	7,434,361	12.16%	1,703	**14.57%**
D Small Town Diversity	5,314,999	8.69%	1,426	**12.20%**
E Active Retirement	2,205,895	3.61%	911	7.80%
O Liberal Opinions	4,958,401	8.11%	869	7.44%
G Careers and Kids	3,508,772	5.74%	803	6.87%
A Alpha Territory	2,159,546	3.53%	699	5.98%
C Rural Solitude	2,652,410	4.34%	675	5.78%
M Industrial Heritage	4,730,954	7.74%	596	5.10%
I Ex-Council Community	5,961,044	9.75%	515	4.41%
H New Homemakers	2,624,980	4.29%	401	3.43%
L Elderly Needs	2,632,309	4.30%	262	2.24%
N Terraced Melting Pot	4,666,352	7.63%	238	2.04%
K Upper Floor Living	3,043,446	4.98%	121	1.04%
J Claimant Cultures	3,566,649	5.83%	105	0.90%
U Unclassified	401,948	0.66%	77	0.66%

Groups B and F show some similarities as both are characterised by those with mid-range incomes, mostly married with children and both enjoy comfortable lifestyles in suburban or semi-rural areas. They do, however, show some key differences in terms of their consumer preferences and values.

Group B, characterised by couples in their 40’s and 50’s whose children have mostly left home to go to University, tend to seek value for money rather than lowest prices and are prepared to pay for brands with a reputation of reliability. They often enjoy several holidays a year, either in Britain or abroad and many will have second homes while others will stay in hotels and Bed & Breakfasts. They are a prime market for broadsheet newspapers, particularly the Daily Telegraph and Sunday Times and are regular and knowledgeable audiences for theatres and concert halls.

Group F, generally younger families with children still living at home, show a greater preference for mainstream brands and prefer to be given information on price, offers and endorsements as opposed to aspiration advertising. Their tastes are generally middle of the road and unpretentious and they are traditionally more likely to respond to adverts in regional newspapers such as the Daily Mail or Daily Express or to direct marketing, telephone and door to door selling. They often enjoy two or three holidays a year and tend to book online through recognised travel agencies.

Meanwhile, Group D Small Town Diversity, as the name suggests, are a fairly mixed group, with some quite well off while others are careful to make ends meet. These people tend to have strong roots in their local community and more likely than most to be in their retirement years. Like Group F, they are generally unresponsive to aspirational advertising and show a preference of brands offering value for money. The focus of their leisure activity is on home improvement and meeting up with friends and relatives and whilst they enjoy day trips to visit local sites of historic interest, longer holidays are more likely to be taken abroad.

The table below presents the results by MOSAIC UK Types, which breaks out the 15 groups into 67 further sub-classifications allowing for more in-depth profiling. The table below shows the top 10 MOSAIC types visiting the South East’s Protected Landscapes’s based on overall counts.

In terms of count, types F24 Garden Suburbia, D19 Innate Conservatives, B06 Yesterdays Captains and G29 Footloose Managers make up the largest proportion of visitors to the South East’s protected landscape areas and represent a fairly mixed profile, although all four can afford to live a fairly comfortable lifestyle.

F24 are particularly common in outer London Suburbs, characterised by older families with two or three children often with two working parents on modest incomes. They tend to holiday on the continent or in Britain, using self-catering accommodation as the basis for touring. They also show an interest in history and gardening.

D19 are typically retired couples who go on several holidays a year, often organised coach tours and cruises, to cultural destinations or places of great natural beauty. B06 are mostly older professionals and managers approaching retirement whose children have left home. They tend to save their money for a series of comfortable holidays to places they have always wanted to go while other leisure activities are generally undertaken by car.

G29 are well paid middle aged executives that are mostly single or without children. Weekends are spent visiting friends and family elsewhere in the country. They eat out a lot rather than cook and participate in many sports such as cycling, skiing and swimming with holidays often based around these activities.

Table 16: Results by MOSAIC UK Types

	UK POPULATION		SE AONB VISITORS	
Group	Count	Proportion	Count	Proportion
F24 Garden Suburbia	1,685,141	2.76%	678	5.80%
D19 Innate Conservatives	1,779,524	2.91%	598	5.12%
B06 Yesterday's Captains	1,214,125	1.99%	540	4.62%
G29 Footloose Managers	1,013,601	1.66%	457	3.91%
B08 Dormitory Villagers	985,431	1.61%	440	3.77%
B05 Mid-Career Climbers	1,415,814	2.31%	417	3.57%
A03 Business Class	891,192	1.46%	413	3.53%
F25 Production Managers	1,829,398	2.99%	408	3.49%
F27 Shop Floor Affluence	1,427,042	2.33%	392	3.35%
B10 Parish Guardians	544,529	0.89%	364	3.11%

3.3.6.2 Key target segments – highest propensity

The following table shows the percentage of visitors falling into each MOSAIC Group along with their corresponding index score. Those segments with index scores of over 100 have a higher than average propensity to visit. In terms of higher than average propensity, Group B again appears top of the list, with an index score of 226, meaning an above average proportion of this group is found within the protected landscape visitor profile, making them a strong target market as they are more likely to undertake visits to the protected landscapes.

The next largest group by penetration is Group E Active Retirement. Group E are typically active elders with sufficient pensions and savings to choose pleasant locations in which to enjoy their retirement. With their mortgages paid off, many in this group choose to sell the family home in favour of living within a low maintenance retirement community, leaving them more time and money to engage in new leisure activities and explore new places as well as enjoying time with the grandchildren. Many spend substantial amounts on overseas holidays while also enjoying day trips to historic properties and walking.

Group A, Alpha Territory also show a high index score, at 169, although they form a smaller proportion of the overall AONB visitor profile. Group A is characterised by successful well educated people with substantial wealth and who enjoy the services of exclusive hotels and restaurants. They are most likely to purchase bespoke luxury items and expensive brands and a high proportion of income is spent on outsourced services

Table 17: Highest Index score by group

GROUP	INDEX
B Professional Rewards	226
F Suburban Mindsets	120
D Small Town Diversity	140
E Active Retirement	216
O Liberal Opinions	92
G Careers and Kids	120
A Alpha Territory	169
C Rural Solitude	133
M Industrial Heritage	66
I Ex-Council Community	45
H New Homemakers	80
L Elderly Needs	52
N Terraced Melting Pot	27
K Upper Floor Living	21
J Claimant Cultures	15
U Unclassified	100

Table 18 :Highest Index score by type

GROUP	INDEX
E20 Golden Retirement	479
B10 Parish Guardians	350
C11 Squires Among Locals	297
B07 Distinctive Success	277
A03 Business Class	243
G29 Footloose Managers	236
B08 Dormitory Villagers	234
B06 Yesterday's Captains	233
B09 Escape to the Country	225
F24 Garden Suburbia	211

Sub-classification of the highest propensity groups into MOSAIC types reveal that the two types with the largest index scores, at more than three times the national average, are Types E20 Golden Retirement and B10 Parish Guardians. Both Types are represented by older people living active, independent and comfortable lifestyles, including some of the wealthiest in the retired population. Leisure time is spent walking or participating in other country pursuits and travel is also popular. Type E20 in particular; spend substantially on holidays, hotels and restaurants. Both Types enjoy spending time with family and grandchildren.

Types C11 Squires Among Locals and B07 Distinctive Success largely represent the wealthy family market made up of relatively well off families or couples who live in rural or semi-rural settings and who take several expensive holidays a year, often to exotic foreign locations. Type C11 are more country orientated and enjoy shooting, fishing and going for walks, whilst Type B07 prefer to spend their leisure time at their nearest exclusive health club or gym.. Types A03 Business Class and B08 Dormitory Villagers typically represent the empty nester market, with Type A03 characterised by well off couples in their 50's or 60's with substantial disposable incomes while Type B08 are typically middle class married couples, with adult children and whose lifestyles are a mix of domestic fun and outdoor pursuits, enjoying many sporting activities.

4. Key Trip Features

4.1 Main purpose of trip

There is an issue with semantics which is worth addressing first. In a number of visitor surveys the 'main purpose of trip' is used almost synonymously with 'main activities engaged in', partly because of the obvious connection between the two and thus the need to avoid appearing tautological (i.e. it is reasonable to assume that a person who gives the main reason for visiting "to go on a walk", will chose 'walking' (if asked) as the main activity engaged in), and partly because of the need to keep questionnaires relatively short and avoid asking similar types of questions.

What most of these visitor surveys do not do is unearth the main underlying drivers which prompted the visit in the first place. For example, a visitor who responds they are visiting to go for a walk, or cycle along a trail, may be driven by the desire to get some fresh air and exercise. A picnic or a trip to an attraction may have been spurned on by the need to do something with the children to keep them entertained, and a trip to a market town may have been inspired by an interest in England's ancient history.

Given this gap in identifying visitors underlying motivations, we are only able to present findings on trip purposes as they are presented in each of the surveys. Before we do this however, it is worth noting more generally that face-to-face interview surveys under-represent activities such as cycling and horse-riding as it is often difficult to stop and interview visitors engaged in these activities.

National survey data on day trips reveal that the most common reason for visiting a National Park was that it is easy to get to, with 80% of respondents giving this as a reason[12]. Other popular reasons mentioned included: good for walking, cycling and other outdoor activity and a safe environment (both 79%). 78% gave the reason of knowing that visitors are welcome, and peace and quiet influenced 76% of respondents to choose to visit a National Park. On the other hand, only 15% gave 'special event or festival' as an influence on their choice to visit the National Park. The six most popular activities for day trips are walking, hill walking and rambling (52%), eating/drinking out (11%), driving (10%), playing sport (6%), cycling (6%) and visiting an attraction (6%).

Table 19: Main activities on leisure trip to National Park

Walk/hill walk/ramble	52%
Cycle	6%
Play sport	6%
Hobby	2%
Attraction	6%
Eat/Drink out	11%
Drive around	10%
Other	7%

Source: ELVS 2005

[12] ELVS allows multiple responses to purpose of trip.

Walking is by far the most popular activity and is the most common reason for visiting given by visitors in the visitor surveys reviewed here.

Chilterns: Walking is the most important single reason for visiting. Thirty-six percent of visitors come specifically for a short walk of up to 2 hours and a further 8% come to take a longer walk of over 2 hours. Around fifth of visitors travel to the Chilterns to take their dog for a walk.

South Downs: The most popular main reason for visiting the South Down is to go for a walk (25%). Results by length of time indicate that around 9% of visitors come for a walk for 1-2 hours; 8% come for a short walk of up to 1 hour and a further 8% visit principally to take a longer walk of over 2 hours long. Walking is closely followed by a visit to a tourist attraction or place of interest (24%) and relaxing/ enjoying the view (19%). Significant differences are found among reasons for visiting between visitor groups. Day visitors on holiday and staying visitors are more likely to be visiting a tourist attraction or place of interest compared to a day visitor from home (40% and 39% respectively compared to 18%). Day visitors from home are also more likely to be visiting for a walk or to walk the dog than the other two visitor groups.

High Weald (Ashdown Forest only): The most frequently mentioned main reasons for visiting are: going for a walk (29%), visiting Pooh Places (18%) and walking the dog (17%). Thirteen percent of visitors are mainly driving around, sightseeing from the car and a similar proportion are visiting mainly to relax, enjoy the views or have a picnic (13%).

Kent Downs (Mid Kent Downs only): The top five motivations for visiting the countryside are: attractive scenery, be in a relaxing environment, peace and quiet, quality and type of accommodation, and to escape the stresses of daily life.

Table 20: Main purpose of trip among visitors

All leisure visitors	Chilterns	South Downs	Ashdown Forest	New Forest	West Berks
To go for a walk	44%	25%	29%	30%	47%
To walk the dog	21%	5%	17%	24%	44%
To relax/ enjoy the views/ picnic	10%	19%	13%	13%	5%
To visit a tourist attraction or place of interest	7%	24%	19%	3%	-
To pursue a hobby or special interest	3%	3%	1%	-	-
To visit a pub, café or tea room	3%	6%	1%	18%	-
To drive around/ sightseeing (from car)	2%	3%	13%	3%	-
To watch nature / wildlife …	2%	3%	1%	3%	31%
To go cycling/ mountain-biking	2%	2%	1%	7%	-
To take part in other outdoor sports	1%	-	-	2%	-
To visit friends or relatives	1%	1%	1%	2%	1%
To visit a town or village	1%	3%		7%	-
On an educational trip or outdoor course	<1%	1%	2%	1%	-
Other purposed	3%	4%	2%	6%	55%
On a special shopping trip	-	-	-	14%	-

New Forest: A third of visitors staying on holiday in the New Forest give their main purpose of visit as going for a walk (32%), while 17% are mainly visiting for relaxation, enjoying views or picnicking. Around 11% come to visit one of the towns or villages and 9% specifically come for recreational off-road cycling.

North Sussex Downs (West Berkshire Country Parks only): The three most popular reasons for visiting Country Parks in West Berkshire are to get some fresh air, go for a walk/get some exercise (e.g. jog), and to walk the dog.

4.2 What visitors most like about the place visited

In a number of the visitor surveys, visitors were asked why they chose the particular location visited.

Chilterns: The most popular reason, mentioned by nearly a third of visitors (29%) is that they have been before and enjoyed their previous visits. The next most popular reason is convenience in terms of getting there. Four percent of visitors had been recommended to visit the location by friends or relatives.

South Downs: Aspects of the location visited which are particularly liked by visitors include; the scenery/landscape (73%); peace & quiet/ uncrowdedness (46%), good walks (34%), the general ambience (28%), and the wildlife/nature (27%).

High Weald (Ashdown Forest only): Visitors enjoy the peace & quiet, tranquility (36%), the views & scenery (34%), the open spaces (25%), and its beauty (12%).

New Forest: The scenery, landscape and views are the most frequently mentioned aspects visitors enjoyed the most, followed by peace & quiet/ not too crowded, good for walking, wildlife, birds and animals.

North Sussex Downs (West Berkshire Country Parks only): The wildlife (bird/flowers/animals) is the aspect which visitors enjoy the most about the Country Park (53% chose this aspect). Other popular aspects enjoyed included the peace and quiet, the scenery, and the park being good for walking

North Sussex Downs (The Ridgeway only): Walkers enjoy the scenery and views offered by the Ridgeway paths and see walking as a chance to escape everyday life.

Table 21: Reasons for visiting the area mentioned by visitors

	Chilterns	South Downs	Ashdown Forest	New Forest	West Berks
Familiarity/ been before/ like the area	29%	15%	-	17%	13%
Easy to get to/ close to home	23%	24%	-	29%	44%
Scenery/ landscape	10%	73%	82%	52%	46%
Good walking country	7%	34%	11%	32%	44%
Other	6%	22%	13%	-	5%
Friends/ relatives live here or live nearby	6%	3%	-	-	1%
Wanted to go to a specific place or attraction	4%	-	-	-	-
Recommended by a friend or relative	4%	-	-	-	-
Never been before	3%	-	-	-	-
Peace & quiet/ not too crowded	3%	46%	40%	42%	48%
Wildlife/ birds/ nature/ animals	2%	27%	32%	29%	53%
Good for other outdoor activity	2%	5%	-	7%	5%
Good for pursuing other interest/ hobby	1%	-	-	-	-
Because it is an AONB	-	-	-	-	-
General ambience	-	28%	-	19%	30%
Attractive villages/towns	-	24%	-	10%	-
Good for dog walking	-	9%	-	20%	36%
Good restaurants/pubs	-	8%	-	5%	
Feeling of freedom	-	-	4%	-	-

NB. Apart from the Chilterns Survey, visitors could provide more than one answer, so results to not total 100%

4.3 Frequency of visits

While there are no definitive figures on the number of people who visit the countryside for recreational purposes, there is some evidence that the main users of the countryside are a relatively small group of people who visit time and time again. The 2007 survey of visitors to the Chilterns found that local resident visitors made on average 45 leisure trips a year. In 2005, 23% of visitors to National Parks had visited the same park on 11 or more occasions in the past year. Seventeen percent had visited the same National Park on 21 or more occasions and 9% on 41 or more occasions (ELVS, 2005).

Chilterns: Eleven percent of visitors are visiting the Chilterns for the first time, while the remaining 89% have visited the Chilterns on at least one occasion previously. Visitors who answered that they visited frequently were asked to establish how frequently they visit during the summer and winter months. The survey found relatively little difference in the number of times a trip is made over the summer and the winter. Forty percent of visitors visit the Chilterns several times a week in the summer and a third visit several times a week in the winter. Six percent of visitors make a trip to the Chilterns every day over the summer and the winter.

South Downs: 32% of all visitors had not visited the South Downs within the 12 months prior to that trip. Most tourist visitors will have visited at least on one previous occasion. One average, 54% of day visitors from home had visited the South Downs on five or more previous occasions within the past 12 months. A third of day visitors from holiday bases visited at least once in the past 12 months (of which 11% had visited five time or more). Just under half of visitors staying overnight in the South Downs (47%) will have visited on at least one previous occasion in the past 12 months (including 19% who visited five times or more).

High Weald (Ashdown Forest only): 28% of all visitors are first-time visitors to Ashdown Forest, including the majority of those who stay overnight in the Ashdown Forest area or on holiday elsewhere. A third (31%) of day visitors from home visit the Forest ‘regularly’ or ‘frequently’.

New Forest: A small proportion of overnight visitors take a short vacation to the New Forest at least once a month (5%), but the majority will not have visited within the past year (38%) or will have visited once or twice during this time (39%). Overall, the average number of vacations to the New Forest is three a year. Day visitors from home are frequent visitors. On average 34% of day visitors from home visit the New Forest one to two times a week. Eight percent visit at least once a fortnight and 7% visit at least once a month.

Kent Downs (Mid Kent Downs only): The survey of visitors to the Mid Kent Downs found that on average visitors had made seven previous trips to the area in the past five years.

4.4 Mode of transport

National survey data reveals that the vast majority of visitors come from car owning households and travel to national parks by private motor vehicle.

Table 22 : Mode of transport used by South East overnight visitors by type of location

	TOTAL	Seaside	Large city / large town	Small town	Countryside / village
Train	13%	14%	15%	14%	7%
Regular bus/ coach	3%	3%	4%	4%	1%
Plane	2%	2%	3%	2%	1%
Boat/ ship/ ferry	0%	1%	0%	0%	0%
Car - own/ friend's/ firm's	73%	69%	71%	72%	82%
Car - hired	2%	1%	2%	2%	2%
Motorised caravan/ campervan	1%	1%	1%	1%	2%
Motor cycle	0%	0%	0%	0%	1%
Bicycle	0%	0%	0%	0%	1%
Organised coach tour	2%	7%	1%	1%	0%
Hitch-hiking (in any vehicle)	0%	0%	0%	0%	0%
Walked/ on foot	0%	0%	1%	1%	0%
Lorry/ truck/ van	1%	1%	1%	1%	1%
Minibus	1%	1%	0%	1%	2%

Source: UKTS 2008 South East regional data

The convenience and ease of travel are the most common reasons for travelling by private motor vehicle. ELVS finds that on average 78% of leisure trips to a National Park involve the car. The high car use is also evident in use for domestic overnight trips to the countryside. Around 84% of countryside / village destinations are reached by car, higher than the regional average of 73% (UKTS, 2008).

The proportion of trips involving the car as the mode of transport in the local surveys tend to be higher than these national averages and this is most likely to be due to the fact that face-to-face interview surveys tend to under-represent those travelling by bike or on horseback because of the practicalities of stopping visitors using these modes of travel. Moreover, in a number of the surveys interviews took place close to car parks as they served as the main entry/exit points for visits. As a result the survey will have under-represented people walking from home or using public transport. A number of local surveys also found that visitors were willing to use public transport but felt the services were inadequate.

Chilterns: 94% of visitors reach the Chilterns by car. The use of public transport, organised coach tours and more sustainable modes of travel such as walking and cycling is generally low (4%). It should be noted that most of the interview sites are not easily accessible by public transport which partly accounts for the low level of use.

South Downs: 84% of visitors travel car. Split by visitor type, 87% of day visitors from home, 79% of day visitors from a holiday base, and 71% of overnight visitors arrive by car. Staying visitors are more likely than average to be walking or using public transport (train/bus services) from their holiday accommodation in the South Downs to reach different parts of the South Downs.

High Weald (Ashdown Forest only): Almost all visitors arrive by private motor vehicle (98%), including 95% of local residents.

Kent Downs (Mid Kent Downs only): Travel by private vehicle is by far the most common way to travel to and around the MKD (95%). Around a quarter of visitors (26%) also walk whilst they are in the area.

New Forest: 96% of holiday visitors staying within the National Park use a car as the main mode of transport to their accommodation base, 2% use public transport (trains or buses) and 2% use other modes of transport including boats and ferries. Once in the New Forest, relatively fewer use their car to get around (down to 67%). The vast majority of day visitors from home (94%) and day visitors from a holiday base (87%) arrive by car.

North Sussex Downs (West Berkshire Country Parks only): 85% of visitors travel to West Berkshires Country Parks by car/van.

Table 23: Modes of transportation used by visitors

	Chilterns	South Downs	Ashdown Forest	New Forest	West Berks
Car/van/4x4/ landrover/motorcycle	95%	85%	98%	84%	87%
Public transport (bus, coach or train)	*1%*	4%	1%	2%	
Coach (private tour)	*<1%*	3%		1%	
Bicycle	1%	1%		4%	3%
Campervan	*<1%*	*<1%*			
Walked	3%	6%	1%	9%	10%

4.5 Length of stay

Leisure day trips to National Parks involve an average dwell time of 2.5 hours, and 72% of domestic overnight trips to the countryside / villages in the South East involve 1-3 nights.

Table 24: Number of nights spent by South East overnight visitors by type of place

	TOTAL	Seaside	Large city / large town	Small town	Countryside / village
1-3 nights	75%	65%	77%	78%	72%
4-7 nights	19%	28%	17%	17%	19%
8 plus nights	6%	7%	5%	5%	9%

Source: UKTS 2008 South East regional data

Chilterns: For day trips, dwelling time is relatively short; 30% of day visitors spend less than one hour on their trip. A further 47% spend between one to two hours on their trip. For overnight visitors the average length of stay in the Chilterns is 4.8 nights.

South Downs: On average, 68% of day visitors (from home and from holiday bases elsewhere) spend between one and four hours; 19% spend less than one hour and 13% spend more than four hours on their trip. The average number of nights spent by staying visitors is five nights

High Weald (Ashdown Forest only): Around a quarter (24%) of visitors spend less than an hour visiting the Forest, while 45% spend 1-2 hours and 19% spend on average 3-4 hours on their visit. Among visitor groups staying in accommodation within Ashdown Forest, the length of stay varied between 1 and 7 nights, resulting in an average length of stay of 4.2 nights.

Isle of Wight (Walking Festival only): Among overnight visitors around 36% stay between 1-4 nights, and 40% stay between 5-7 nights.

New Forest: Visitors staying in the New Forest and those visiting for the day while staying away from home elsewhere spend an average of 2.2 hours at the survey site. The average dwell time for non-local day visitors from home is similar at 2.3 hours. Visitors staying overnight in the New Forest on leisure or holiday trips stay for an average of 5.4 nights.

North Wessex Downs (West Berkshire Country Parks): On average, visitors to Country Parks in West Berkshire spend 1.6 hours on their trip.

4.6 Information used to plan trip

The visitor surveys show that a third or less of all visitors consult information such as leaflets, brochures and maps about the area visited before their trip. This is not surprising given the high level of repeat trips. Most visitors rely on their own previous knowledge of the area. When sources are consulted it is usually a map, usually Ordnance Survey maps.

Chilterns: Around 19% of visitors will have consulted information sources prior to their trip. Of those visitors who use pre-trip information sources, 67% will use a map to plan their visit, of which 43% will use an Ordnance survey map, 18% will use ‘other maps’ and 6% will use specific tourist maps.

South Downs: Around a third of visitors will have consulted maps or other sources of information either before or during their visit. Ordnance Survey maps are most frequently used (27%), particularly by overnight visitors. Other maps, guides and touring books are also used by day visitors on holiday and staying visitors either prior to or during their visit.

High Weald (Ashdown Forest only): Overall, around one third of all visitors will use information sources such as websites (3%), maps (17%) or guides (24%) to plan their visit to Ashdown Forest.

New Forest: 34% of all visitors will use maps or information sources to plan their visit to the New Forest. This will tend to vary between 61% of visitors staying overnight in the New Forest and 27% of day visitors from home. Of those who use information sources to plan their visit, Ordnance Survey maps, tourist maps and other maps will be most frequently used to plan visits. Smaller proportions of visitors will use walking guides, touring guide books, visitor leaflets or websites. Staying visitors are also more likely to use the Public Transport Guide and Map (6%) or consult websites (5%) than day visitors.

North Sussex Downs (West Berkshire Country Parks): Given the high number of local visitors and visitors from neighbouring districts and counties, it is not surprising to find that most visitors are well acquainted with the area, relying on their local knowledge. Overall, 73% of visitors said they used local knowledge to find out about Country Parks in West Berkshire and 85% said they used local knowledge to find out about public Rights of Way in West Berkshire. Around a fifth (22%) relied on knowledge from friends or relatives.

Table 25: Information sources used to plan trip

	Chilterns	South Downs	New Forest
Base	19% of sample	30% of sample	34% of sample
Ordnance survey map	43%	27%	45%
Internet website (please specify)	20%	4%	4%
Other map	18%	17%	13%
Walking guide	12%	6%	8%
Other source (s)	12%	2%	9%
Tourist map	6%	10%	12%
Tourist/ visitor leaflet (please specify)	6%	8%	6%
Touring guide book (e.g. AA/ Readers Digest)	3%	11%	7%
Personal recommendation	2%	3%	3%
Information/ visitor centre (please specify)	1%	2%	4%
Brochure/ holiday guide (please specify)	1%	2%	3%
Road signs	1%	6%	8%
Advertisement/ poster	1%	1%	0%
Newspaper article/ TV or radio feature	1%	1%	0%

Multiple responses permitted in Chilterns and New Forest survey

4.7 Visitor expenditure

Given the different years each survey was carried out and the impact of inflation on prices, it is difficult to provide an up-to-date figure for average expenditure per trip to the South East protected landscapes. Notwithstanding this problem, it is still useful to examine the survey data to review the patterns of expenditure at the time of each survey.

The most up-to-date information comes from UKTS and reveals that in 2008 the average expenditure for an overnight trip to countryside / village destinations in the South East was £128 per person, higher than the average spend in 2007 and 2006 in nominal terms. Interestingly, the average expenditure for overnight visitors in the South Downs in 2003 and in the New Forest in 2004 was much higher than this regional average at £133.25 and £168.91 respectively.

The findings of visitor surveys of protected landscapes in the South East reveal that the average expenditure among day visitors is relatively low when compared to the national averages, ranging from £5.96 in the New Forest to £8.66 in the Chilterns. According to ELVS routine leisure trips to the countryside (and this will include both locals and non-locals) involved an average daily expenditure of £13.38 in 2005. Average expenditure among tourism day trip visitors (trips which last three hours or more and are not taken on a regular basis) was much higher, around £29.77 per person. Leisure trips to National Parks involved the lowest average expenditure per person per trip, on average £11.50[13].

[13] ELVS does not provide any data on tourism day trips to National Parks. Data is available for leisure trips only.

Table 26: National avg. day trip spend

Leisure trips to countryside	£13.38
Tourism trips to countryside	£29.77
Leisure trip to National Parks	£11.50
Avg. for all leisure trips	£25.09
Avg. for all tourism trips	£42.93

Source: ELVS, 2005

Table 27: Regional avg. overnight trip spend

	2008	2007	2006
Seaside	£168	£168	£153
Large city/large town	£134	£114	£128
Small town	£129	£119	£120
Countryside/ village	£128	£101	£105

Source: UKTS 2008, 2007 & 2007 regional results

Chilterns: On average, visitors staying overnight in the Chilterns spend more per day than visitors staying outside the Chilterns, local residents and non-local day visitors from home (£13.02 per person per day compared to £7.33 for those visiting from accommodation bases outside the Chilterns, to £5.16 for local residents and £8.66 for day visitors from home). The biggest area of expenditure for all visitors is eating and drinking, representing 63% of total expenditure. Expenditure per person per night on accommodation by visitors staying within the AONB boundary is on average £15.42 per night.

High Weald (Ashdown Forest only): The sample of overnight visitors is too low to provide credible data. Overall, the average spend among all visitors was found to be £7.16 per day.

South Downs: Average expenditure at the South Downs differs significantly by site, from £8.78 per person per day at Amberley to only £2.08 per person per day at Queen Elizabeth County Park. Overall, the largest proportion of expenditure goes towards the cost of food and beverages. Overall, the average daily spend for a day visitor from home is £8.29, for a day visitor from a holiday base elsewhere, the average is £11.15, and for an overnight visitors, it is £11.28. The average amount spent on accommodation by those staying specifically within the South Downs national park area is around £27.69 per person per night.

New Forest: The average daily spend for a day visitor from home is £5.96, for a day visitor from a holiday base elsewhere it is £11.54 and for an overnight visitors, it is £13.77. The average amount spent on accommodation by those staying specifically within the national park area is £15.99 per person per night

North Sussex Downs (The Ridgeway only): Visitor spending is currently limited as visitors mainly park in free car parks and usually bring their own food. A small proportion of visitors do spend money in local pubs, shops and occasionally stay overnight in local accommodation. From our consultation exercise, it appeared that visitors were willing to spend money, but there were limited opportunities to do so.

Table 28: Average expenditure per day/night per visitor

<table>
<tr><th></th><th>Chilterns</th><th>South Downs</th><th>Ashdown Forest</th><th>New Forest</th></tr>
<tr><td>Day visitor from home</td><td>£8.66</td><td>£8.29</td><td rowspan="6">£7.16*</td><td>£5.96</td></tr>
<tr><td>Day visitor from holiday base elsewhere</td><td>£7.33</td><td>£11.15</td><td>£11.54</td></tr>
<tr><td>Overnight visitor</td><td>£11.95</td><td>£11.28</td><td>£13.77</td></tr>
<tr><td>Spend on accommodation</td><td>£16.49</td><td>£16.41</td><td>£15.99</td></tr>
<tr><td>Total for overnight visitors per night</td><td>£28.44</td><td>£26.65</td><td>£31.28</td></tr>
<tr><td>Total for overnight visitor per trip</td><td>£136.51</td><td>£133.25</td><td>£168.91</td></tr>
</table>

**Only an overall expenditure figure is available for all visitors and excludes accommodation costs.*

4.8 Awareness of protected landscape status

In 2005, 55% of all leisure trips that were geo-coded to a National Park during the interview were identified as being to a National Park by the respondent, when they were prompted (ELVS,2005).

Chilterns: The 2007 survey found that 85% of visitors were aware that they were in the Chilterns Area of Outstanding Natural Beauty.

Kent Downs (Mid Kent Downs only): Recognition of the term “Area of Outstanding National Beauty” was high (93%). Awareness of the Kent Downs achieved lower recognition at 76%. In total, 60% of respondents knew that the Kent Downs is an AONB. Perhaps significantly, only 71% (just fewer than 3 persons in every 4) knew they were actually visiting the Kent Downs on this trip.

South Downs: In 2003 around half of all visitors were unaware that they were in an area that (as it was then) part of the proposed South Downs national park. Awareness was significantly higher among day visitors from home than either staying visitors or day visitors on holiday (57% compared with 38% and 24% respectively). As might be expected, awareness was highest among local visitors. Around 72% of local residents reported to know that they were in an area that is part of the proposed South Downs national park, compared to 47% of non-local visitors.

High Weald (Ashdown Forest only): The 2007 survey found that 84% of all visitors were aware that Ashdown Forest is located within the High Weald AONB. This included 95% of local residents and 87% of all day visitors from outside the Forest area. Awareness was somewhat lower among day visitors from holiday accommodation outside the area (40%) and visitors staying overnight in Ashdown Forest (33%).

5. Volume and Value Assessment

5.1 Estimates of visitor volume

There are no overall figures on the number of people who visit the region's protected landscapes. We do, however, have data on the estimated number of people who visit the countryside in the South East for holidays and day trips and their associated trip expenditure.

Tourism South East's estimate of the number of tourism day trips to the region in 2008 put the figure at 180 million[14]. Around a third of tourism day trips (around 54 million) are spent in the regions countryside. Of the 16.3 million domestic overnight trips spent in the region, 19% involve countryside / village locations and a further 29% involve small towns, many of which will be market towns located in the regions protected landscapes.

Trend data reveals that the overall volume of domestic overnight trips to the region has declined over the past few years and this reflects a national trends following increasing competition from cheap foreign package holiday breaks. However, the recent economic downturn has appeared to have altered domestic travel behaviour, with relatively more people choosing to holiday at home. At the time of writing, data we received from VisitEngland reveal that in the month of July, total England overnight domestic trips are up 24% and holiday trips are up 40% (year-to-date figures all trips types are up 5% and holiday trips are up 20%). These figures are very encouraging for domestic tourism and with more visitors choosing non-serviced accommodation holidays such as self-catering and camping/caravans, there are positive indications for a potential growth in countryside holidays.

Table 29: Volume of domestic overnight trips to the South East

	2008	2007	2006
Weighted Base	16,295,000	17,861,000	18,143,000
Seaside	3,707,000	4,489,000	4,669,000
	23%	*25%*	*26%*
Large city/ large town	5,336,000	5,801,000	5,380,000
	33%	*32%*	*30%*
Small town	4,723,000	4,909,000	5,426,000
	29%	*27%*	*30%*
Countryside/ village	3,154,000	3,499,000	3,493,000
	19%	*20%*	*19%*

[14] The figure is derived Tourism South East's assessment of the 2002-3 Great Britain Day Visits Survey and the 2005 England Leisure Visits Survey.

Three of the protected landscapes commissioned research into the volume and value of tourism. There is a difference in the way a local trip was defined in the Chilterns study compared to the other two national park studies which do not make estimates of day trips comparable to the other studies. All residents from the 11 local authority districts which the Chilterns AONB crossing were defined as local visitors. The actual population residing within the Chiltern's is relatively small; approximately 79,400 people (6%) of the total district population (all 11 districts) reside within the AONB boundary. The term 'local visitor' in the South Downs and New Forest National Parks survey referred to visitors living within the boundary of the National Park and in towns and villages immediately bordering it.

Table 30: Estimated volume of all visits

	Chilterns		South Downs		New Forest	
Local resident day trips			8,683,000	25%	2,038,800	15%
Day trips from home	52,333,945	95%	18,326,000	52%	8,540,400	63%
Day trips from accommodation base elsewhere	1,934,633	4%	6,771,000	19%	1,423,300	10%
Overnight trips	898,540	2%	1,231,000	4%	1,552,900	11%
Total	55,167,118		35,011,000		13,555,400	

5.2 Estimated expenditure associated with trips

The total value of expenditure on tourism day trips spent in the South East is approximately £6.3 billion[15]. Countryside trip expenditure makes up approximately £1.35 billion of this total expenditure.

Domestic overnight trips spent in the regions countryside and small towns make up 43% of total trip expenditure (see table below).

Table 31: Total domestic trips expenditure in the South East

	2008	2007	2006
Weighted Base	£2,350,000,000	£2,353,000,000	£2,429,000,000
Seaside	£623,000,000	£753,000,000	£713,000,000
	26%	*32%*	*29%*
Large city/ large town	£715,000,000	£663,000,000	£690,000,000
	30%	*28%*	*28%*
Small town	£608,000,000	£584,000,000	£651,000,000
	26%	*25%*	*27%*
Countryside/ village	£403,000,000	£353,000,000	£366,000,000
	17%	*15%*	*15%*

Source: UKTS, 2008

[15] The figures are derived from Tourism South East's assessment of the 2002-3 Great Britain Day Visits Survey and the 2005 England Leisure Visits Survey.

Based on the volume and value assessment, the direct value of visitor expenditure in the Chilterns, the South Downs National Park and the New Forest National Park is as follows: .

Chilterns: £336,900,000

South Downs £266,000,000

New Forest: £123,000,000

Table 32: Estimated expenditure of all visits

	Chilterns		South Downs		New Forest	
Local resident day trips	£297,128,011	88%	£44,804,280	17%	£7,646,000	6%
Day trips from home			£138,301,000	52%	£42,084,000	34%
Day trips from accommodation base elsewhere	£14,180,860	4%	£36,224,000	14%	£16,425,000	13%
Overnight trips	£25,554,478	8%	£46,633,000	18%	£56,853,000	46%
Total	£336,863,349		£265,962,280		£123,008,000	

In addition to these estimates, a recent study of the visitor potential of the Ridgeway in North Wessex Downs AONB put the economic value figure at £18.2 million.